

Charter Schools Program National Dissemination Grant Application

United States Department of Education

CFDA Number 84.282T

National Alliance for Public Charter Schools (Lead Applicant)

Tennessee Charter Schools Center (Partner Applicant)

**Facilitating Charter Schools: A Proposal to Create a Charter School Facility Center at the
National Alliance for Public Charter Schools.**

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Project Summary

As the leading nonprofit dedicated to supporting the charter school sector, the National Alliance for Public Charter Schools is keenly aware that limited access to adequate facilities and facilities funding is one of the major issues impacting the ability for more students nationwide—including traditionally underserved students—to attend public charter schools (Absolute Priority 2) To address this challenge, the National Alliance—in partnership with the Tennessee Charter School Center (Appendix E1), a charter school support organization with best-in-class facility support programs for charter schools—will **create and launch the Charter School Facility Center (CSFC or Center), the first-ever initiative solely dedicated to helping charter schools access better and less expensive facilities and facility finance.** By lowering the cost and complexity of accessing buildings, charter schools will have more money to put in classrooms and school leaders will have more time to devote to student success.

The CSFC will (1) **capture and widely disseminate existing best practices** for locating, improving and funding facilities for charter schools, and (2) **develop and widely disseminate new, innovative solutions** for the same. Major activities include: (a) creating a national advisory board of industry leaders to improve the collection of existing best practice resources and identify the best new ideas that merit wide dissemination; (b) supporting discrete projects to address acute needs; and (c) widely disseminating the information and resources to school leaders, policymakers, and finance professionals through local, state, and national channels developed by the National Alliance and its grant partners. The CSFC will undertake projects of differing scope and length over the course of the grant period. It is a goal of the CSFC that the impact of each project will endure beyond the length of the grant period. In that regard, projects

will be designed to accommodate ongoing, low-cost methods for dissemination (e.g. via the National Alliance or partner websites).

In the short term, the CSFC will measure its success via the demand for resources created (e.g. website downloads) and via participation in the projects, events, and activities (e.g. attendance and survey evaluation). Over time, the CSFC will gauge its success through specific evidence of increased access to high-quality buildings and cost savings for charter school facilities.

Absolute Priority

This proposal is responding to Absolute Priority 2: Improving Charter School Access to Facilities and Facility Financing. This application meets this priority because it proposes to widely disseminate best practices in the many states with charter school laws.

The National Alliance for Public Charter Schools (National Alliance) is the largest national non-profit dedicated to advancing the public charter school movement. As such, the National Alliance is keenly aware that limited access to adequate facilities and funding for facilities remains a significant issue impacting growth in the number of charter schools available to the nation's students. The National Alliance strongly believes that all authorized charter schools should have access to an adequate and affordable building, and that facilities should not be a barrier to entry of the charter sector.

On a more local level, the Tennessee Charter School Center is one of the state charter associations with a strong focus on facility issues. They have supported technical assistance solutions for years. They have dedicated staff with facility-related technical skills. Together, the National Alliance with the Tennessee Charter School Center (TCSC) propose a new initiative to address the facility challenges faced by the majority of the sector: the **Charter School Facility**

Center (CSFC). The CSFC will help charter schools access facilities through the following two strategies:

1. Develop, identify, and expand best practices for facility solutions
2. Disseminate new innovative solutions and the existing best practices to public-school leaders, both charter and district, and other stakeholders.

The CSFC will be convened and managed by the National Alliance to support collaboration with, and research and development efforts among, partners throughout the charter school movement. The CSFC will collect successfully proven practices and develop new best practices for dissemination. The best practices will be distributed throughout the sector using a variety of dissemination mechanisms that will build on the existing capacity and networks of the National Alliance and TCSC.

The National Alliance has identified four specific, initial projects for development and dissemination to achieve the two goals outlined above. These projects address significant existing facility needs, as identified by experts and members of the National Alliance's network, and illustrate the type and variety of future projects. In subsequent years, the National Alliance will invite leaders from across the nation's charter school community to identify additional projects and the Advisory Council established through this proposal (page 22) will vet these projects.

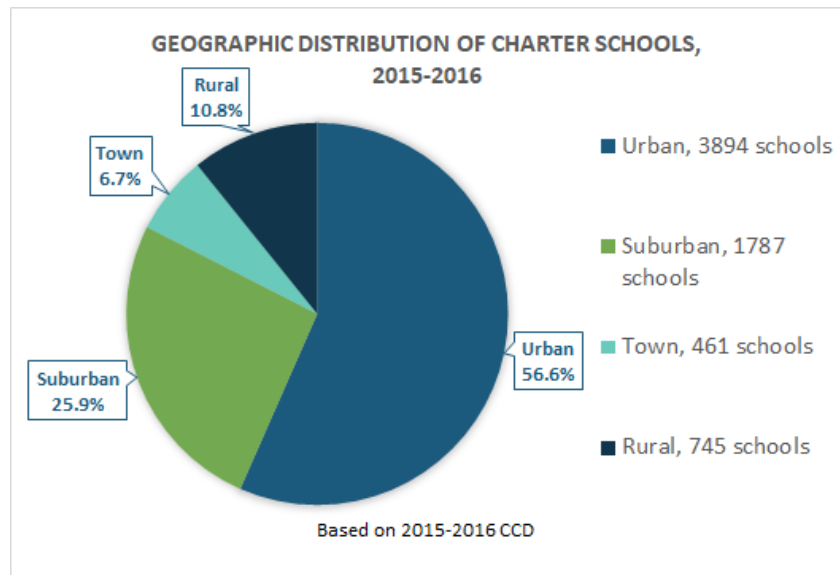
By selecting four initial projects for this grant, the CSFC will be able to implement and disseminate best practices in year one, while simultaneously commissioning the Advisory Council and soliciting and reviewing ideas. The dissemination mechanisms for each project will vary, but materials, research, and findings will be accessible to the entire field (page 13 for a detailed dissemination plan).

| Year One Projects | Dissemination | Page |
|--|------------------------------------|-------------|
| 1. Facility Data Transparency (Absolute priority 2(i), (ii), (vii)) | National | 25 |
| 2. Replicating USDA Financing Success for Rural Charter Schools (Absolute priority 2(i) Access to public and private funding for facilities) | Selected States | 26 |
| 3. Local Capacity Building through Technical Assistance (Absolute priority 2(vii) Planning for facility acquisition) | National/Southeast for replication | 27 |
| 4. Accessing District Space (Absolute priority 2(ii), Access to public facilities) | Nationwide | 29 |

Competitive Preference Priority

This proposal addresses the Competitive Preference Priority: *Empowering Families and Individuals to Choose a High-Quality Education That Meets Their Unique Needs*. This proposal meets this competitive priority because year one Project #2, Replicating USDA Financing Success for Rural Charter Schools, which is described in detail on page 26, specifically addresses the needs and context of rural charter school operators, leaders, and families. Given the strong tendency for Indian student populations to live in rural communities, the project's significant focus on charter schools in rural communities will have an inevitable impact on students defined as Indians as described in the competitive priority (also see a proposed project in future years for best practices regarding Indian charter school facilities on p 30). By expanding access to affordable facilities financing, this project targets funding to expand educational choice to students in communities served by rural Local Educational Agencies (LEAs). By removing obstacles to accessing buildings in rural areas, potential charter school operators, who typically

are not experts in facility finance, will have more and easier access to financing in areas where new construction is often the only means of opening a new school. Currently 10.8% percent of charter schools serve students in rural areas.



The U.S. Department of Agriculture's (USDA) Rural Development administers a program with significant and underutilized potential for expanding choice to rural areas through charter schools. The Community Facilities Direct Loan & Grant Program provides low-interest direct loans, guaranties, and grants to public entities and nonprofit organizations that are building “essential community facilities” in rural areas and towns of up to 20,000 in population. This program is well-funded, financing billions of dollars of rural development projects each year. Charter schools qualify for rural development financing and, where charter schools have accessed USDA financing, it often provides the lowest cost of capital for charter school facilities. Despite this, fewer than 20% of the nation’s rural charter schools have successfully financed through USDA Rural Development, with substantial gaps in where those transactions have taken place. This gap is illustrated in recently conducted research showing that 53% (\$433 million) of the total USDA’s investment (between 2009 and 2016) in charter schools has gone to three states

(HI, NC, UT) with relatively little (less than 2%) going to six states with large rural charter school communities (AZ, CA, CO, MI, MN, TX).

Momentum Strategy & Research (MSR), a Colorado-based research and policy organization, leads an informal coalition of groups supporting rural charter school efforts called the Rural Charter School Collaborative and, in collaboration with the USDA national office, has led the research on charter school utilization of USDA funds to date. All the participating organizations agree that increasing understanding of, and access to, accurate information about charter school financing will improve state-by-state access to USDA financing. The National Alliance has identified Momentum's "Replicating USDA Financing Success" as a prioritized first-year project to expand on the existing, multi-pronged research efforts of the Rural Charter School Collaborative. The results will provide a report relevant to schools, finance professionals, policy-makers, and USDA officials with invaluable insight into charter school financings. Project deliverables include: 1) a published report documenting specific, industry-useable data points from USDA financed charter school transactions to date; and 2) an explanatory presentation of findings for in-person or webinar delivery to USDA state-and-local rural development officials. The CSFC will be charged with dissemination of this work as outlined on page 13 of this document. The outcome of this work will be improved charter school access to USDA Rural Development financing as measured by increases in the volume of USDA supported transactions and dollar figures both nationally and within the six states significantly underrepresented to date (see above).

This report will be disseminated to targeted audiences - rural schools, finance professionals, policy-makers, and USDA officials - using each of the "dissemination mechanisms" described in detail below. Specifically, report information will be provided to

schools through *SchoolBuild* and the recently created Rural Charter School Collaborative, to policy and advocacy leaders through National Alliance's network of charter support organizations, to finance professionals through the Alliance of Facility Professionals (AFP) and USDA state and local officials through an ongoing working relationship with USDA's national office.

Finally, as will be the case with each of the funded projects, information from "Replicating USDA Financing Success" will be disseminated through the Alliance's uniquely available venues – the annual National Charter Schools Conference hosted by the National Alliance— and serving over 4,500 participants, and the National Alliance's regular newsletter and communications reach to over 30,000 charter school contacts across the nation.

For each of the various projects produced through the CSFC, the National Alliance will ensure its dissemination strategy includes a rural charter component, including distribution through the Rural Charter School Collaborative's active database of rural schools. This commitment to rural charter schools is not new. In addition to active engagement with the Rural Charter School Collaborative, the National Alliance has demonstrated continued dedication to the advancement and growth of rural charter schools. Every year, at the National Charter Schools Conference, specific content strands are developed to address the unique needs of rural charter school operators. Additionally, to boost participation, the National Alliance has provided rural charter school operators with registration subsidies to the National Conference so they may partake in the professional development and networking opportunities. Without these subsidies many rural charter school operators would not be able to participate due to the high cost of travel from rural locations.

Furthermore, the National Alliance has dedicated significant resources and staff capacity to creating and managing a community of practice for two new charter school states: Alabama and Mississippi. This community of practice provides education, access to experts, and strategic advice to these emerging movements in mostly rural states. Without the National Alliance's dedication to these states, the stakeholders on the ground in Alabama and Mississippi would not have the resources and expertise to recruit high-quality leaders and open high-quality schools their communities desperately need.

Selection Criteria

A. Significance of Project

(1) The potential for generalizing from the findings or results of the proposed project;

The National Alliance is uniquely situated to develop, identify, and expand best practices that are generalizable to the vast majority of charter schools in 44 states and the District of Columbia. The National Alliance has a 14-year track record of producing publications, tools, and resources developed for broad use throughout the charter school community, as well as targeted resources designed for certain states or subsets of charter schools. In response to eligibility, the National Alliance serves as a charter school support organization that is not an authorized public chartering agency and provides, on a statewide basis, assistance to developers during the current planning, program design and initial implementation of charter schools, in the states of Alabama and Mississippi. Leveraging the knowledge gained through 25 years of sector development in other states, the National Alliance works directly with charter applicants, authorizers, and policymakers to ensure new, high-quality schools open in new-law states. Further the National Alliance leads the charter school sector from the nation's capital and supports the charter school community in ways that include the following:

- Education and professional development opportunities through the annual National Charter Schools Conference, as well as through online resources, master classes, webinars, and conference calls
- Weekly charter support organization (CSO) newsletter reaching more than 600 charter support organization staff
- Quarterly meetings of the National Alliance State Leader's Council (the SLC is comprised of the leaders of nearly all the state charter support organizations)
- Quarterly master class trainings (funded through the USED sponsored National Charter School Resource Center) on issues such as accountability and serving students with disabilities
- The National Alliance's Model Charter School Law, disseminated nationwide, that embeds best practices on all issues affecting charter schools, from accountability to school facilities to serving students with special needs. The model law served as a framework in the development of Kentucky's new charter school law.

The National Alliance advocates for the millions of public school students attending or hoping to attend a charter school. This work is accomplished through federal and state advocacy efforts, research, and elevating national awareness for the charter school movement. The National Alliance educates lawmakers and thought leaders about how charter schools can meet the needs of the communities they serve by providing families with public school options. The organization leads the charter school community from our nation's capital, and with broad reach through our various partners, brings together charter school teachers, leaders, lawyers, researchers, and policy experts through events like the annual National Charter Schools Conference, convenings, online resources, regular communication etc.

The National Alliance works on behalf of all schools and all issues but does have several areas of specific focus. The National Alliance works in a few emerging charter school states to

help the charter movement get off the ground. Similarly, it manages specific projects focused on distinctive topics in collaboration with leaders in respective fields. Specifically, 10 years ago the National Alliance launched the Alliance of Public Charter School Attorneys - which to date provides communications and networking opportunities among charter school attorneys, and manages a Legal Action Fund targeting resources to the most meritorious cases or projects facing charter schools. This model has been used to generalize findings from court cases and legislation in one state and apply the findings in other states.

The following proposal - launching the Charter School Facility Center (CSFC) borrows heavily from that model and the National Alliance's experience over the past decade. It is built around the National Alliance's national leadership role, and attendant capacity as a convener and distributor of information to the field.

The CSFC will disseminate best practices across the nation's charter school community. It has two primary goals:

- Develop, identify, and expand best practices for facility solutions
- Disseminate new, innovative solutions and the existing best practices to public-school leaders, both charter and district, and other stakeholders

While charter school facility needs are diverse and varied, the majority of charter schools face facility challenges to some degree. The work of the CSFC, and the findings it disseminates, will provide information that will be useful to most charter schools across the nation, including:

- *Charter school in rural areas.* There were 745 in 2015-16.¹

¹ 2015-16 Common Core of Data and the National Alliance Directory & Enrollment Database.

- *Charter schools in subpar facilities.* e.g. the forty percent of charter schools without ideal amenities, nor desired specialized classrooms, to best implement their educational model.²
- *Charter schools looking to expand.* Nearly half of charter schools (49 percent) are in school buildings that do not have space for their anticipated enrollment in five years.
- *Charter schools seeking more favorable financing terms.* The majority of charter schools (53 percent) rent or lease space from a non-profit organization or a commercial entity. In fact, only 27 percent of charter schools constructed their own building. The remaining 20 percent were located in a district or government building (16 percent) or had a mixed ownership structure (4 percent). Not surprisingly, nearly half of charter schools (49 percent) were located in buildings that were not originally intended to be a school.

Virtually all charter schools that have constructed their own building would be interested in having a lower interest rate (one that would be more comparable to district schools).

- *Charter schools looking to access district space, including shared options.*
- *States that wish to strengthen facility policies.*
- *New operators opening to meet unmet demand.* When the National Alliance conducted a survey of CSOs, they listed facilities as the number one issues limiting supply growth.

(See Appendix E2 for more details on demand and lack of access to proper facilities.)

The extent of this opportunity cannot be overestimated. By some estimates, the total value of all charter school properties and leases is more than \$40 billion. Each year, charter schools may be spending more than \$4 billion in annual lease and mortgage payments on the full value of their properties. Even small reductions in the cost of projects or the costs of financing

² <http://blog.publiccharters.org/top-5-facilities-struggles-for-charter-schools>

can add up quickly. If charter schools could reduce their interest rate by 1%, and be closer to what district schools pay, then the savings to charter schools could be \$100 million each year. The National Alliance understands this type of impact can take years if not decades to realize, and is much longer than this three-year grant program. The dissemination of best practices is the first step in a long journey to reaching our vision of a more equitable facility landscape.

This is why the purpose of this project is to improve access to charter school facilities and facility financing at lower costs for charter schools nationwide. The activities proposed must be able to be generalized across the country. The proposal hypothesizes that implementing best practices and solutions identified by the CSFC, charter schools will be able to:

- access facilities to create more seats for students to receive a quality education, and
- access more affordable facility financing to direct more money into educational programs rather than facilities, and direct more time and effort into educational programs rather than struggling with facility's financing.

Many of the activities described in the project plan will help schools and CSOs directly and then be scaled nationwide. Other activities can leverage state policies to create a more favorable facility environment. Most states lack robust, funded facilities financing mechanisms for charter schools (Appendix E3). One aim of this project will be to inform the National Alliance's Model Charter School Law with best practices that are not already captured in the current iteration. Incorporating facilities best practices in the Model Law provides states and policy makers with a template for a high-quality charter school law, including state facility policies they need to improve. The Model Law has been effectively used to generalize the findings of the best laws in each state and share them with other states.

- (2) The extent to which the results of the proposed project are to be disseminated in ways that will enable others to use the information or strategies.

This project proposes to disseminate best practices to identified *audiences*, using specifically targeted dissemination *mechanisms* for each.

Audiences

Policy Makers – Primary dissemination through *Charter Support Organizations*. The National Alliance’s long-standing relationship with charter support organizations, (associations and others), supplies a natural dissemination vehicle to those individuals and groups most closely connected to local and state policy-makers. The National Alliance has regular meetings with and communications vehicles to respective groups. Charter support organizations are key leaders of creating robust charter sector at the state level. The National Alliance has a strong relationship with these individuals and regularly interfaces with them on many levels to determine needs, impediments, opportunities etc. of the charter sector.

Facility and Facility Finance Professionals – Primary dissemination through the *Alliance of Facility Professionals (AFP)*. Modeled after the National Alliance’s lawyer organization—the Alliance for Public Charter Schools Attorneys (APSCA, referenced on page 19) —AFP will provide an opportunity for the nation’s charter school finance professionals to gather and network virtually on an ongoing basis, and in-person at five events over the course of this grant. Those events and online access to finance professionals between events provides a first-hand dissemination tool for research and materials relevant to finance professionals.

While the National Alliance and partner organizations have various familiarity with and ties to all sorts of finance professionals, there is no current networking mechanism supporting their work. Again, following the model of the APCSA, the launch of this group will serve as both a dissemination vehicle for project information but also serve as an overall industry-

strengthening opportunity. The National Alliance has the immediate ability to launch this network thanks to a database of contacts including over 400 individuals from financial institutions.

Schools – Primary dissemination through *SchoolBuild* (Appendix E4). In 2017, the Local Initiatives Support Corporation (LISC), (a non-profit Community Development Financial Institution), and the National Alliance partnered on *SchoolBuild*. An online research portal, *SchoolBuild* provides critical data on charter school facility transactions and guides schools through the facility development process from start to finish. *SchoolBuild* helps to make charter school real estate projects easier to complete by increasing access to the capital markets, updating sector data in real-time, and ultimately lowering the cost of capital by ensuring transparency and promoting competition. As a clearinghouse of the best and most up-to-date information and research in the facility financing sector, the portal is relevant to the entire charter school community, with an emphasis on those who have limited development or finance experience. A project cost calculator helps determine what the operators can afford and what their project will cost. An interactive map provides statewide information, including funding programs, and connects users to financing partners by geography. The content guides help users learn best practices and key document templates offer practical support for completing their facility projects.

In its first year, through partnership with the National Alliance network and access to charter schools nationwide there were more than 4,900 users/sessions and 12,000 page-views of *SchoolBuild*. Users/sessions are when someone goes to the *SchoolBuild* website, whereas pageviews captures how many times any “page” of *SchoolBuild* is visited. *SchoolBuild* will serve as the primary dissemination mechanism for school-facing compilations of best practices

and for data collected as part of the "Facility Data Transparency" project (see page 25). In order to continually maximize *SchoolBuild*'s reach the Alliance will undertake ongoing communications efforts in conjunction with LISC, charter support organizations and other partners to increase school access. As each project outcome with a school focus is produced it will additionally disseminate through both CSOs and finance professionals as groups with regular school contacts.

For this grant the National Alliance will work with *SchoolBuild* to provide a direct vehicle for schools to access project information. As a result, *SchoolBuild* is both a dissemination vehicle, and a lasting location to permanently house the resulting information and tools. The activities that are part of our communications effort will:

1. Establish *SchoolBuild* as the premier online research portal to access information critical to making facilities decisions
2. Increase awareness of *SchoolBuild* amongst charter schools who are not already familiar with the site
3. Continue to engage with our existing charter school audience by providing new content and in-person events

SchoolBuild's communications efforts will take place across a number of channels including: paid media, social media, partnerships, and events. This multi-channel approach will ensure that the CSFC is meeting the many segments of the charter school audience where they search for facility financing information. It will also ensure that our colleagues within the sector are able to share the value of *SchoolBuild* with their charter school clients. Multi-Channel communications efforts include:

Website improvements: Update *SchoolBuild*'s homepage to include a rotating banner which will allow promotion of new research or upcoming events on the site

PR/Communications: Secure media placements that frame *SchoolBuild* as a source for relevant information on charter school facilities

Paid Media: Run Google and Facebook ads targeted towards school leaders

Social Media: Leverage LISC and social media accounts of partners to share *SchoolBuild* with target audiences

Partnerships: Partner with sector colleagues to share their latest research via *SchoolBuild* and also share *SchoolBuild* with their audience of charter schools and partner with principal-prep and school leadership programs to promote *SchoolBuild* to their participants

Events: Host online live classes that share information found on *SchoolBuild* and will drive traffic to the site, present at national and state charter school conferences, host regional charter school workshops to connect directly with our charter school audience

In addition, the National Alliance has a database of thousands of school leaders and advocates. One specific group, School Leaders of Color (SLOC) has been formed to reach minority-serving and minority-led charter schools to cultivate relationships, train leaders in advocacy, and support areas of need and growth such as providing access to best practices and information on facilities access and financing for historically underserved communities.

Summary of Dissemination Strategies

| YEAR ONE Projects | Dissemination Audience and Mechanisms | Page |
|--|--|-------------|
| 1. Facility Data Transparency | Schools, Policy, and Finance Professionals CSOs, ACSFP, School Build | 25 |
| 2. Replicating USDA Financing Success for Rural Charter Schools | Policy, Schools, Finance Professionals CSOs, <i>SchoolBuild</i> , and ACSFP | 26 |
| 3. Local Capacity Building through Technical Assistance | Schools CSOs, School Build | 27 |
| 4. Accessing District Space | Schools (through CSOs) CSOs, and <i>SchoolBuild</i> | 29 |

(3) The likelihood that the proposed project will result in system change or improvement

This project has a high degree of likelihood of resulting in systemic change and improvement. The existing best practices pre-identified for dissemination in the first year have already shown success in various states. For example, USDA Rural Development financing is already serving charter schools well where reasonably available. Translating their best practices to other states with substantial numbers of rural charter schools has considerable promise. Similarly, the CSFC priorities focus on best practices shown to work – such as efforts in California to expand access to district facilities and co-sharing opportunities. These can have systemic improvements by encouraging and supporting states, school districts and charter schools to work together to use existing school district space efficiently and equitably for all public school students. Improving access to district space has long been identified as one of the

most beneficial and systemic strategies to relieve facility access and facility costs for charter schools.

(4) The extent to which the proposed project is likely to build local capacity to provide, improve, or expand services that address the needs of the target population.

The unique feature of this proposal is the National Alliance's natural position as convener of relevant leaders from across the nation and accompanying ability to build local capacity by disseminating to each audience. From the experience of the Legal Action Fund, the National Alliance learned the importance of having a broad network of diverse experts to bring the best ideas forward for national attention and resources.

The CSFC will undertake projects that are specifically designed to build local – including school level - capacity. For example, the design and dissemination of the "Local Capacity Building through Technical Assistance" project (page 27) provides CSOs with the means to develop local capacity to provide services. Similarly, the "Facility Data Transparency" project (page 25) will provide a framework to develop a systemic approach to collect and share valuable information about facility projects at the local level. School leaders will be able to directly access this information and CSOs and other groups can leverage this database to expand information services for school leaders and school board members.

The "Accessing District Space" project (page 29) will provide valuable lessons learned about successful practices in accessing and sharing district school building space. This information can be used to improve the negotiations and collaboration necessary in day-to-day operations at a school. School leaders will be able to make decisions on-site rather than working through a central office. This is a simple example of capacity being developed at the local level. The mechanisms of dissemination will further develop local capacity. Through in-person and online trainings, the CSFC will greatly improve the capacity of stakeholders on the ground to

obtain facilities and access financing. The trainings will target knowledgeable and connected individuals in key markets across the country to receive trainings and participate in the AFP. Armed with their new resources and education, these stakeholders will then be able to act as an expert and source of information for peers in their community.

Further, the convenings of the AFP managed by CSFC, will act as a virtual sounding board for members to tackle tough issues and brainstorm solutions together. As part of the regular AFP meetings, opportunities for networking and sharing will be provided.

B. Quality of Project Design

(1) The extent to which the proposed project demonstrates a rationale (per 34 CFR 77.1(c));

Nearly one in five charter schools (17 percent) had to delay their opening date by a year or more due to facilities related issues. Charter schools spend an average of \$748 per pupil on rental and/or financing payments after accounting for any state facilities assistance. This spending on facilities diverts critical funds away from the classroom and limits programming options for charter school students. In addition, 40 percent of charter schools completed a major capital project in the past five years in order to renovate, upgrade, or otherwise maintain their facilities—and the median capital project cost nearly \$500,000. The proposal for the CSFC at the National Alliance demonstrates a rationale as it is seeking to mitigate key barriers to growth and is informed by research or evaluation findings that suggest this project is likely to improve outcomes. The proposal is informed in both its design and in its implementation.

The design of the CSFC is based on the success of the National Charter School Legal Action Fund (LAF) and APSCA managed by the National Alliance. The LAF is committed to supporting charter school sector partners in courtrooms throughout the country. The LAF provides technical assistance and funding for cases that could have considerable impact to the

broader charter school sector. The LAF receives requests for support from the field and a national Advisory Board of experts and practitioners vet cases for support. The APCSA, the National Alliance's network of more than 400 charter school attorneys, engages regularly through a listserv and biannual meetings to help inform the National Alliance, and each other, of emerging issues. (Appendix E5)

The implementation activities proposed by the CSFC are similar in nature to the activities undertaken by the LAF. While they address different issues (facility issues versus legal issues), they take a similar approach, beginning with an inclusive model using an advisory board and a community of practice to solicit and select projects. This inclusive model has opened the door to many opportunities in states, facility experts, professionals and others that often feel disassociated from larger groups. For example, the in-person convenings of the APCSA have been found to be extremely valuable by the participants with approval ratings over 90%. The CSFC will incorporate these successful practices.

Beyond the structure of the CSFC, the specific projects identified for the CSFC to address have shown success. One of the projects, "Replicating USDA Financing Success for Charter Schools", will leverage the lessons learned from the three states that have been able to utilize the program. Between 2009 and 2016, 55% of the \$740 million in USDA charter school financing went to charter schools in just three states: Utah, Hawaii, and North Carolina. The current interest rate for USDA funds is 3.75% fixed for forty years. This is a successful program that needs to be disseminated throughout the country, especially in states with high numbers of rural schools.

Similarly, a proposed future project for year 2 or year 3 of this grant proposal is to identify and disseminate information regarding the most successful ongoing, state credit

enhancement programs. The few states that have statewide credit enhancement programs (CO, UT, TX, and more recently AZ), have shown to reduce borrowing costs to charter schools by up to 150 basis points. This has saved schools millions of dollars in interest payments. This is another successful program that needs to be disseminated throughout the country. These key project components, both the CSFC approach to operations and the projects it will undertake, are informed by evaluation findings and suggest the CSFC will be successful in its pursuit of its goals and outcomes.

(2) The extent to which the goals, objectives, and outcomes to be achieved by the proposed project are clearly specified and measurable;

The project plan has a purpose of expanding opportunities for all students – particularly traditionally underserved students – to attend public charter schools and meet challenging state academic standards; and increasing the number of high-quality charter schools available to students across the United States. The project plan includes: two Goals, two Objectives, four Activities, five Outputs, and eight Outcomes. The project components are clearly specified and measurable. The project plan is supported by a Logic Model described at the end of this section and illustrated in graphical format in Appendix E6. The Logic Model includes the other project components of the project plan such as the inputs and resources.

Goals: The project plan has two goals.

1. To develop, identify, and expand best practices for facility solutions
2. To disseminate the existing best practices to other charter schools, other public schools, and other stakeholders.

Measurable Objectives: There are two objectives for the goals:

1. Capacity Building: Disseminate resources from best practices to schools and CSOs to help them make more informed decisions about facilities.

2. Improved Programming: Disseminate information about state and federal programs to schools and other state leaders to encourage the expansion of these best practices.

It is our vision that these objectives should, over time, result in more schools accessing more affordable facilities and more affordable facility financing as stated earlier in this application. This long-term vision is not part of the measurable outcomes for the three-year grant period.

Activities

There are four activities: (1) create an advisory council and a community of practice, (2) solicit and select best practices, (3) convene facility experts, and (4) disseminate best practices.

Activity #1: Create an Advisory Council and a Community of Practice

To ensure that the CSFC represents the interests and needs of the charter school community, the Project Director and key staff will create an Advisory Council with up to 15 members within the first three months. The Advisory Council's responsibilities will include the solicitation of ideas among their respective networks and the selection of projects in partnership with the community of practice. The members will represent a strategic range of stakeholder organizations including: charter schools, state charter school associations, charter school lenders, state education agencies or authorizers, philanthropic organizations, and charter school attorneys. The National Alliance will draw on key experts that have been engaged for a number of years on this topic and have ranges of experience in their respective fields. A list of individuals that have recently participated in two key convenings within the last year can be found in Appendix E7. Founding members of the Advisory Council include: Cameron Quick of the Tennessee Charter School Center and Nicholas Watson of the California Charter School Association representing the charter school state associations; Jonathan Harwitz, director of the Charter School Lenders

Coalition; Sara Sorbello of LISC and manager of *SchoolBuild*; and Jim Griffin of Momentum Research & Strategy.

The CSFC will create a community of practice called the Alliance of Facility Professionals (AFP) comprised of charter school facility experts and stakeholders that will serve as an engine of ideas and will be a primary recipient of dissemination efforts. Over the past several years the National Alliance has identified, recruited, and cultivated a coalition of approximately 50 charter school facility stakeholders through events and meetings and the CSFC's community of practice will expand on the existing coalition. In year one the CSFC plans to have at least 100 members, and then double participation over the next two years. There is currently support of approximately 20 facility-focused organizations committed to this project (see letters of support, Appendix B).

In the first year of this grant, the AFP will convene once at an annual Conference, and will meet twice in the second and third year. The content of the AFP meetings will be expertly curated and will engage issue experts across the field. The meetings are discussed further on page 31.

The National Alliance is modeling the AFP after a similar group created for charter school attorneys, Alliance for Public Charter School Attorneys (APCSA). This group has organically grown through strategic engagement and educational opportunities. APCSA now has more than 450 members who regularly convene to share best practices and is an invaluable resource for not only the National Alliance but the entire charter school movement.

Activity #2: Solicit and Select Best Practices

The CSFC will solicit a slate of best practices to be researched, developed, and disseminated. The solicitation will be made through three channels.

1. First, during the periodic Advisory Board meetings, the CSFC will request that Advisory

Board members reach out to their networks to solicit existing or proposed best practices to be developed.

2. Second, the CSFC will broadcast a general solicitation in the form of a Request for Information (RFI) on Facility Best Practices to the AFP. The CSFC will broadcast the RFI on public websites including the National Alliance, the NCSRC, and *SchoolBuild* during each year of the three-year grant period. This may also be structured through a competition.

3. Third, the CSFC will convene the AFP to solicit best practices through their networks.

Each project will be submitted in a Project Form. A sample of the form is in Appendix E8. The Advisory Council will prioritize and select the projects to be developed and disseminated.

The CSFC will provide technical assistance to an estimated four teams to advance their projects each year. In the first year, while developing the solicitation and selection process, the CSFC will commence with pre-selected projects identified by our partner, TCSC, and leading experts in the field. These four projects are:

1. Facility Data Transparency (development of a new facility best practice)
2. Replicating USDA Financing Success for Rural Charter Schools (identification of an existing best practice)
3. Local Capacity Building through Technical Assistance (identification of an existing best practice)
4. Accessing District Space (identification of an existing best practice)

These four projects represent a range of best practices both in their status (new best practices and existing best practices) and in their approach. The "Facility Data Transparency" project, the "Replicating USDA Financing Success for Rural Charter Schools" and the "Local Capacity

Building through Technical Assistance" projects are all marketplace solutions that can be replicated nationwide. The "Accessing District Space" project implies a partnership approach where a local or state agency can participate in the delivery of the solution. These best practices require support from local or state governments. These four projects are described below and also shown in the Project Forms in Appendix E8.

Project #1 – Facility Data Transparency (Develop a Best Practice)

There is, surprisingly, very little data accessible to schools and operators about charter school facility transactions that would better inform them about typical costs for similar schools and the cost of financing options. This project would compile a state-by-state database of relevant information about each facility project and highlight a short story and key findings as it pertains to the gathered data. This information would be accessible to other schools seeking to develop and finance a facility, giving them a baseline or benchmark comparison to current industry norms and trends in their state. This will allow schools to make better informed decisions before entering into their individual agreements. This information may include: charter school facility inventory; projects costs; project size; type of building (school-owned, commercial lease, district lease); sources and uses; debt pricing and structure; bond data; NMTC data; and project team members (contractors, brokers, architects, financial advisors, and lenders).

The primary means of dissemination will be through state CSOs and *SchoolBuild*. The expected outcome of this project is to build capacity at the local level to allow school leaders to make better and more informed facility decisions. In the first year of the grant, the CSFC would complete the research in one state. In the second and third years, the CSFC would complete this in two states each. Feedback will include surveys of participants and follow-up interviews 6 months later to see how the database impacted their decision making for facility related projects.

Project #2 – Replicating USDA Financing Success for Rural Charter Schools (Identify a Best Practice)

USDA Rural Development financing is a well-funded federal program financing billions of dollars of rural development projects each year. Charter schools qualify for rural development financing, and where schools can get it, USDA funds provide the absolute lowest cost capital for charter school facilities financing. Yet fewer than 20% of the nation's rural charter schools have successfully financed through USDA Rural Development. Some of the explanation of that can be seen in recently conducted research showing that 53% (\$433 million) of the total USDA investment in charter schools between 2009 and 2016 has gone to three states (HI, NC, UT) with less than 2% to schools in 6 major rural charter states (AZ, CA, CO, MI, MN, TX).

Momentum Strategy and Research (MSR) leads an informal coalition of groups supporting rural charter efforts called the Rural Charter School Collaborative, has led USDA research to date, and has also crafted an *Industry Metrics* research plan in collaboration with USDA's national office. All the participating organizations agree that increasing understanding of and access to accurate information about charter school financing to date will inform and improve state by state access to USDA financing.

Industry Metrics will be produced under this research effort, providing key school and transaction data on 217+ USDA charter school transactions since 2009. The results of *Industry Metrics* will provide schools, finance professionals, policy-makers, and USDA officials with invaluable insight into charter school financings. The report will be broken down into the following categories:

1. Updated summary of USDA transactions to date and activity across charter states;
2. School Profile: Develop profile of schools benefitting from USDA financing (e.g.

location, students, and performance);

3. Transactions: Develop profile of finance transactions to date (e.g. size, terms, parties, and financial performance), including notable transactions (Defaults and Closures, Success Stories)
4. Recommendations strengthening USDA Rural Development for charters (written for the different audiences involved e.g. schools, USDA officials, and policy-makers).

The expected outcome of this project is to increase the number of schools accessing these funds, especially in high rural school states.

Project #3 - Local Capacity Building through Technical Assistance (Identify a Best Practice)

This project will provide build local capacity at the CSO level to disseminate best practices. This project designs a series of local presentations and content addressing topics such as financing variations, acquisitions, development processes, and the strengths and pitfalls commonly associated to each strategy. The presentations will be designed in an unconventional format by providing charter leaders with objective and unbiased information shared by facilities experts rather than sales pitches by service providers. The presentations will highlight many of the small details that can affect a project but are often overlooked or not disclosed upfront. This methodology and accompanying pilot presentation was designed and completed in Tennessee in 2017. Under the guidance of Cameron Quick, Director of Operations with the Tennessee Charter School Center (TCSC), facility experts from different fields across Tennessee were brought together to meet with charter school leaders in Memphis. In this meeting, presenters were strategically selected to explain their role and function in the facility process. They then had to explain why or how their products or services were not ideal solutions for charter schools in every situation. This allowed charter school leaders to leave with a clear understanding of what

providers charter schools should use during the facilities process, and why. More importantly, charter school operators were able to clearly understand what providers they should *not* utilize in their particular school or network.

To close the session out, all presenters had to participate in a panel discussion and answer questions regarding the common pitfalls surrounding the issues frequently associated with their products or services. This approach of disseminating information facilitated greater trust with the presenters, and also created a more engaging and collaborative interaction between the presenters and participants. Schools were also able to better understand the questions and strategies they needed to employ before engaging with businesses offering products or services. The dissemination of the local technical assistance resources will take two forms. First, the CSFC will host five meeting events, similar to the one described above in partner states during the first year of the grant. The grant will support the travel of the presenters and the hosting of the facility meeting. The states will be identified via a request for a proposal and the CSO that can demonstrate the highest anticipated charter school turnout will be selected.

The second method of dissemination is to stream and record the presentation and widely disseminate the recordings throughout the CSFC and partner networks. This will allow any school to view the presentation, and for other CSOs to host viewing sessions.

The expected outcome of this project is to build capacity at the local level to allow school leaders to make better and more informed facility decisions.

Project #4 – Accessing District Space (Identify a Best Practice)

Over the past 15 years, CCSA has played a central role in helping California charter schools access existing school district facilities via different mechanisms including through Proposition 39 (“Prop 39”), a voter approved constitutional amendment that provides charter

schools with a legal right to access district space. CCSA has spent the years following Prop 39's passage working with more than 500 individual schools collectively learning how to maximize charter school opportunities to access district space.

CCSA has learned valuable lessons and developed a set of tools and resources that could be implemented to benefit charter schools across the nation. Those tools and resources include live and recordable training sessions and workshops, template documents, guides, legal support programs, and an extensive collection of school facility data that is updated yearly and made available online for public access. Of course, CCSA recognizes that no other state has exactly the same Prop 39 leverage, and the focus of this dissemination work is on content (Accessing District Space toolkit) that has relevance in any community. The project will publish a report/toolkit detailing the various tools and resources that CCSA has developed, and providing strategies for developing similar resources tailored to maximizing opportunities available in other states, and a presentation for in-person or webinar delivery to charter support organizations across the country. Dissemination will involve several 1-1 consultations with charter school leaders and/or charter support organization staff from different states to ensure preparedness for broader dissemination.

Projects #5-12 in Years 2 and 3

After the first year, the CSFC will turn to the solicitation and selection process described earlier in Activity #1 for future projects. The National Alliance has conducted a poll of charter support organizations and industry experts indicating a need for support mechanisms. The most commonly mentioned ideas include:

- Acquiring District Facilities: Improving access to vacant district facilities by documenting the practices, transactions, and circumstances of charter schools acquiring district facilities;
- Facility Incubators: Exploring the experience of charter school facility incubators supporting the growth and development of new schools, and documenting important lessons learned;
- City Master Planning and comprehensive education facility policies: Compilation and typology of municipal planning systems and tools, including education planning policies where applicable;
- State laws regulating access to district facilities: Evaluation of state policy features encouraging support for charters accessing district space;
- State per pupil facility funding mechanisms: Building upon existing data and compilations of materials on per pupil funding to inform future policy efforts.
- Challenges and opportunities for facilities for Indian populations: Researching and documenting the unique facilities challenges and opportunities involved with charter schools serving Indian populations as raised and discussed at the National Alliance's recent National Conference, where sessions dedicated to rural schools ended up having a significant Indian focus.

Activity #3: Convene Facility Experts to select innovative ideas

The CSFC'S launch of the Alliance of Facility Professionals will include convening the group in person at five conferences over the life of the grant. In the first year, the AFP will convene once, most likely in conjunction with the National Charter Schools Conference (the Conference. In years two and three, the AFP will convene twice each year.

The Conference will provide an opportunity for the AFP to meet other experts, network, and share best practices, and participate in educational seminars and presentations. The content for the Conference will be carefully and strategically curated to meet the needs of the AFP and will allow the CSFC, and the advisory council, to vet new and innovative ideas with the field. The Conference will also be a key vehicle for disseminating best practices. In the first year, the National Alliance will leverage the National Charter Schools Conference and invite approximately 100 attendees. In the subsequent years, the CSFC will host the facility conference on its own with approximately 200 attendees, drawing on the robust community of practices that will be identified, recruited, and cultivated in year one. No convening of this size or quality focused on charter school facilities has been assembled for the sector before and the National Alliance expects these meetings will be invaluable to all stakeholders.

Activity #4: Disseminate Best Practices

The four projects will have similar dissemination plans, although there will be some distinction based on the target audience.

The “Facility Data Transaction” and “Local Capacity Building through Technical Assistance” projects are intended to benefit school leaders and CSOs. The CSFC will disseminate the findings to schools, CSOs, and facility experts to help school leaders. The CSFC will also disseminate to CSOs with the encouragement that projects will be replicated in their states. The CSFC will use a broad spectrum of mechanisms. The primary mechanism will be *SchoolBuild*, the on-line portal developed by LISC and discussed earlier.

The “Replicating USDA Success for Rural Charter Schools” and “Accessing District Space” projects are intended to benefit policy makers in addition to school leaders and CSOs. The CSFC will also disseminate to policy makers through the CSOs with whom the National

Alliance has developed a longstanding relationship in the form of the School Leaders Council. Information will also be disseminated to schools via *SchoolBuild*.

All of these projects will also use a broad array of dissemination mechanisms.

- 1) *Conferences and convenings*. The CSFC will host a national convening of facility professionals and those interested in learning more about facility issues (charter school operators, charter school board members, charter school authorizers, state education agencies, foundations, and policy makers). This convening may be part of the National Charter School Conference hosted by the National Alliance. The findings from the four projects will be presented at the conferences. Over 4,000 people attended the 2018 National Charter School Conference.
- 2) *Advisory Board*. The Advisory Board members represent a variety of user groups. Each Advisory Board member will be responsible for the dissemination of best practices and innovative solutions to their respective groups. For example, two of the Advisory Council members represent the Charter School Lenders Coalition, a collection of the non-profit charter school lending institutions. They can disseminate the findings of the projects to this group.
- 3) *State and Local Technical Assistance workshops and webinars*. The findings of the projects can be disseminated through state and local technical assistance workshops. This allows for more in-depth discussion about the findings and a personalized response to individual questions.
- 4) *National Alliance's and third-party email lists and websites*. The National Alliance can disseminate the findings on their website and third-party websites such as the National Charter School Resource Center. Will be promoted via email. The National Alliance has a mailing list of over 30,000 charter school names.

- 5) *Coalitions*. The CSFC can partner with coalitions when they exist. For example, one project is “Replicating USDA Financing Success with Rural Charter Schools”. The findings from this project can be disseminated through a new, targeted coalition: the Rural Charter School Collaborative.
- 6) *One-on-one discussion on policy endeavors*. The CSFC will utilize one-on-one person-to-person discussions with important decision-makers in states around the country for the projects that target policy makers. The National Alliance has partnerships with advocates and can develop talking points about specific issues that are shared with state officials and those preparing policies.
- 7) *Policy papers*. The findings can be produced in a series of policy papers that are shared with decision makers and advocates. The National Alliance has a long and successful history of producing these publications.

These mechanisms can reach all 44 states with a charter law and the District of Columbia. These can reach all charter schools and all authorizing agencies. (See dissemination plan, page 38)

Outputs

There are five specific measurable Outputs over the three-year grant period. The CSFC will:

- Create an Advisory Council and solicit best practices to be developed and disseminated.
- Create the Alliance of Facility Professionals and select best practices to be developed and disseminated.
- Summarize the finding of four best practices each year of the three-year grant.
- Convene the Alliance of Facility Professionals five times over the three-year grant period.
- Disseminate the finding and summaries of four best practices each year of the 3 year grant.

Outcomes

There are eight specific measurable Outcomes over the three-year grant period. The CSFC will:

- See an increase in the number of requests for data from the facility database (website hits, live requests);
- See an increase in the number of citations of the data and the database;
- See an increase in the measure of usefulness of the data by facility professionals;
- See an increase in the number of schools financed by USDA;
- See an increase in the number of schools financed and dollars invested in states historically underrepresented by USDA;
- See an increased amount of enhanced technical capacity regarding facilities at the school level;
- See an increase in the number of states replicating the capacity building events
- See an increase in the number of CSOs and districts using the Toolkit to drive access to district space

Logic Model

The Logic Model describes the resources, activities, outputs, and outcomes of the project (Appendix E6). This logic model is designed to support the goals of developing and identifying best practices and disseminating these best practices, and the objectives of reducing facility costs and reducing the time spent on facility issues by school leaders. This will allow them to devote that time and energy into the classroom to improve student achievement, rather than focus on bricks and mortar.

Each of the four pre-identified projects has a logic model described below (described in detail in Appendix E6).

| Resources | Activities | Outputs | Outcomes |
|--|--|--|---|
| #1 Facility Data Transparency project | | | |
| Researchers to collect information about school facilities | Data about costs, financing sources, and timelines; and stories about lessons learned | Searchable database with facility information; benchmark metrics | Requests for data from the database (website hits, live requests); Number of cites of the data; measured usefulness of the data by facility professionals |
| #2 Replicating USDA Financing Success for Rural Charter Schools | | | |
| Research analyzing and evaluate prior rural transactions for lessons to inform and improve future financings | A description of rural facility programs and a description of rural facility projects; recommendations on how to access these programs | Written report increasing industry-wide capacity to access USDA lending; Presentations to USDA officials | A 10% increase in the number of schools financed by USDA; 50% more schools financed and dollars invested in states historically underrepresented by USDA |
| #3 Local Capacity Building through Technical Assistance | | | |
| Subject Matter Experts and the TCSC | Explaining technical details; recommending | Presentations to live audiences; videotaped | Enhanced technical capacity regarding facilities at the school |

| | | | |
|--|--|---|--|
| | options; storytelling about lessons learned; and documenting the process | presentations disseminated on websites; written stories accessible through public reports; guidebook for other CSOs to follow | level; Replication of the capacity building events by other states |
| #4 Accessing District Space | | | |
| California advocacy leaders compile materials and experiences helping schools access district facilities | Producing the “District Facilities Toolkit” to improve school access to district space | Toolkit of materials and information to help schools or districts interested in sharing district space | Number of CSOs and districts using the Toolkit to drive access to district space |
| Future priority topics for years 2 and 3 | | | |
| Advisory Team and AFP; Funding to support research and evaluation of best practices | Solicit and select projects | New and existing best practices to research and develop and disseminate to the charter school community | School leaders use resources to make better decisions; State leaders adopt proven programs from other states |

(3) The extent to which the proposed project represents an exceptional approach to the priority or priorities established for the competition; and

The National Alliance brings their national role to this project and their proven ability of producing and disseminating publications, tools, and resources developed for broad use throughout the charter school community. The proposed project has four key characteristics that make it an exceptional approach to the priority of improving access to facilities and facility financing by disseminating best practices, especially those that affect underserved communities.

- 1) The National Alliance has the broadest reach and access to the most stakeholders
 - a) The CSFC is sponsored by the National Alliance, a national organization with vast reach to all states and has partnerships with CSOs through the State Leaders Council.
 - b) The CSFC and the National Alliance has national reach and can tap into the most diverse set of opinions.
 - c) The National Alliance is the host of the National Charter Schools Conference and can convene facility experts in conjunction with the Conference.
- 2) The National Alliance has a track record of disseminating best practices as follows:
 - a) Proven dissemination mechanisms such as a website with a publications section
 - b) A partnership with the National Charter School Resource Center and LISC's *SchoolBuild*
 - c) Proven ability to produce webinars on a variety of complex topics
 - d) Developing numerous research publications to disseminate best practices
 - e) Generating policy papers
- 3) The CSFC is based on proven models as follows:

- a) Follows the model of the Legal Action Fund and the Alliance for Public Charter School Attorneys which are both initiatives of the National Alliance.
 - b) Has a wide reaching and inclusive method for soliciting and selecting projects and has already identified projects for the first year.
 - c) The National Alliance recently completed a two-year project of working with six selected states on sharing solutions to numerous charter school issues, including a few facility issues, resulting in improved policy and facility funding for charter schools.
 - d) The National Alliance recently convened input from over 30 national experts during the publishing of its latest Federal Facility Policy Paper.
- 4) The National Alliance has a focus on undeserved communities such as rural schools through the Rural Charter School Collaborative and the National Conference.

(4) The mechanisms the applicant will use to broadly disseminate information on its project so as to support further development or replication.

As discussed earlier, the CSFC will target three general audiences for dissemination. Each audience will require multiple dissemination mechanisms that may vary based on the best practice being disseminated.

Audiences

For Policy Makers – *Charter Support Organizations*. The project benefits from the National Alliance’s long-standing relationship with charter support organizations, associations, and other support organizations, supplying a natural dissemination vehicle to those individuals and groups most closely connected to local and state policy-makers.

For Facility Finance Professionals – the *Alliance of Finance Professionals*. Modeled after the National Alliance’s lawyer organization—the Alliance for Public Charter Schools Attorneys

referenced on page 20—the ACSFP will provide an opportunity for the nation’s charter school finance professionals to gather and network virtually on an ongoing basis, and in-person at five events over the course of this grant.

For Schools – *SchoolBuild*. In 2017, the Local Initiatives Support Corporation (LISC) and the National Alliance partnered to create *SchoolBuild*, an online research portal that provides critical data on charter school facility transactions and guides schools through the facility development process from start to finish. *SchoolBuild* helps to make charter school real estate projects easier to complete by increasing access to the capital markets, updating sector data in real-time, and ultimately lowering the cost of capital by ensuring transparency and promoting competition. As a clearinghouse of the best and most up-to-date information and research in the facility financing sector, the portal is relevant to the entire charter school community, with an emphasis on those who have limited development or finance experience.

Mechanisms

The CSFC’s Dissemination plan offers a broad array of *mechanisms*. The specific dissemination mechanisms chosen for each project will depend on the materials, the extent of the findings, the audiences, how widely the information is applicable (states, regions, or beneficiaries), and the potential for further development and replication.

In addition to the three mechanisms described above (Charter Support Organizations, Alliance of Facility Professionals, and *SchoolBuild*), the following represent additional means available:

- 1) *Conferences and convenings*. The CSFC will host a national convening of facility professionals and those interested in learning more about facility issues (charter school operators, charter school board members, charter school authorizers, state education

agencies, foundations, and policy makers). This convening may be part of the National Charter School Conference hosted by the National Alliance.

- 2) *Advisory Board* members through user groups. The Advisory Board members represent a variety of user groups. Each Advisory Board member will be responsible for the dissemination of best practices and innovative solutions to their respective groups. The CSFC will leverage existing user groups. The National Alliance's Legal Action Fund provides a proven model for how this can be created. Examples of these user groups include, but are not limited to:
 - a. *Charter School Lenders Coalition* comprised of non-profit charter school lenders
 - b. *Foundations* through Education Cities, a trade association of local foundations interested in spurring the growth of charters, or through The Philanthropy Roundtable.
- 3) *State and Local Technical Assistance workshops and webinars*. One of the projects, "Local Capacity Building through Technical Assistance", supports state and local technical assistance workshops to provide users with unbiased reviews of different facility solutions. These workshops can also be used to provide research and findings from the CSFC. These workshops will often be live and can be videotaped for webinars. Occasionally they will be conducted by webinar only.
- 4) *National Alliance's and third-party websites*. The National Alliance will publish the findings on their website. This will be especially useful for formats such as interactive databases that may not be supported on third party websites. The National Alliance will also seek to partner with other websites such as the National Charter School Resource Center.
- 5) *Coalition of subgroups*. Projects undertaken by the CSFC will target certain subgroups. For example, one project is "Replicating USDA Financing Success with Rural Charter Schools" is

targeted to those living in rural areas. This effort will leverage the Rural Charter School Collaborative to disseminate best practices.

- 6) *One-on-one discussion on policy endeavors.* The CSFC will utilize one-on-one person-to-person discussions with important decision-makers in states around the country. The National Alliance has partnerships with advocates and can develop talking points about specific issues that are shared with state officials and those preparing policies.
- 7) *Policy papers.* The findings can be produced in a series of policy papers that are shared with decision makers and advocates. The National Alliance has a long and successful history of producing these publications.

These mechanisms can reach all 44 states with a charter law and the District of Columbia. These can reach all charter schools and all authorizing agencies.

C. Management Plan

(1) The adequacy of the management plan to achieve the objectives of the proposed project on time and within budget, including clearly defined responsibilities, timelines, and milestones for accomplishing project tasks;

On-time and within Budget

The CSFC propose a three-year grant period to execute the project through this grant opportunity with the United States Department of Education. The key success factors to completing this project on-time and within budget are the skills of the project manager, the systems used to manage costs and schedules, and the strategies to accelerate tasks.

The project manager, Mark Medema, has experience managing multi-million-dollar federal grants over extended years. He has managed grants for the Department of Education, the Treasury Department, and the USDA. All of these grants are on-schedule and within budget. The Alliance has experience with project management systems to manage a similar effort in the Legal Action Fund. The Alliance will use the same scheduling, time management and budgeting

systems for the CSFC as we do for the LAF. The National Alliance will serve as the primary grantee for receipt of grant funding, and will contract with the TCSC during this period, and other CSOs later in the grant period to fund their specific roles. The Alliance will strive to develop private investment and other sources of revenue to sustain the project beyond the third year of the grant.

The CSFC has selected a hybrid strategy to ensure the project is completed on time. To accomplish all the activities in a three-year period requires the CSFC to start immediately upon receipt of notification of the grant award. The CSFC is balancing the desire to have an inclusive process to solicit and select best practices with the need to complete projects by the end of the first year. The strategy to accomplish this is to pre-identify a number of projects through the staff and the partner for the first year while the Advisory Council is being formed during the first quarter of the fiscal year. Similarly, the first convening of the AFP will take time to set-up and the CSFC does not want to lose time. The Advisory Council and AFP can participate in the dissemination of the best practices in the first year while soliciting projects that will be implemented in the second and third years.

The timeline by which the National Alliance and TCSC will implement the project will follow three distinct phases, one for each of the three years in the grant period. This allows the project to deliver results even if subsequent yearly funding is not available. The timeline includes major milestones in each of the three project years— key benchmarks or activities critical to the project's success. The project's partners intend to adhere to this timeline with fidelity; however, to the extent that new opportunities or challenges arise, the National Alliance and TCSC will adjust course appropriately in order to achieve the project's primary goals, objectives, and outcomes. The timeline that this project's partners have constructed is as follows

(assumes October 1, 2018 project start date and all years are stated as Federal Fiscal Years from October-September (FFY):

Project Management: The following table lists the project tasks, milestones, timelines, and responsibilities of the individuals working on each task.

| <u>Project Tasks</u> | <u>Milestones</u> | <u>Timelines</u> | <u>Responsibility</u> |
|--|---|---|--|
| Create an Advisory Board | Meet with Advisory Board to solicit best practices and review projects | Confirm Advisory Board by Dec 31. Meet quarterly throughout the three-year grant period | National Alliance to invite members and schedule meetings. Mark Medema to manage meetings |
| Create and Convene the AFP Meetings | Convene community of practice to solicit and disseminate best practices five times throughout the three-year grant period | Meet in June of each year in conjunction with National Conference Meet in January of years 2 and 3 | National Alliance to invite members and schedule meetings. Mark Medema to manage meetings |
| Solicit Best Practices | Receive recommendations for projects | Review recommendations on a quarterly basis | National Alliance to develop, distribute, and collect responses for Request for Information |

| | | | |
|--|--|--|---|
| Manage project #1 – Facility Data Transparency | Complete database of facility project information | Project complete in 1 state by 9/30/19. Project completed in 2 more states by 9/30/2020 | TCSC to manage project. Mark Medema to summarize findings. National Alliance to manage dissemination |
| Manage project #2 – Replicating Success of Rural Financing | Complete analysis of rural financing | Project complete by 9/30/19 | Momentum Research to manage project, summarize findings, and disseminate |
| Manage project #3 – Local Capacity Building/ Technical Assistance | Complete technical assistance programming | Project completed in 5 states by 9/30/19. Project completed in 3 more states by 9/30/2020 | TCSC to manage project and summarize findings. National Alliance to manage dissemination |
| Manage project #4 – Accessing District Space | Complete Toolkit for co-sharing | Toolkit complete by 9/30/19 | CCSA to manage project and summarize findings. National Alliance to manage dissemination |

| | | | |
|--|---|---|--|
| Select projects in years 2 and 3. | <p>Select projects #5-8 for 2019.</p> <p>Select projects #9-12 for 2020</p> | <p>Projects #5-8 selected by 6/30/19</p> <p>Contracts awarded to project managers by 9/30/19.</p> <p>Projects #9-12 selected by 6/30/20</p> <p>Contracts awarded to project managers by 9/30/20</p> | <p>Mark Medema and Project Team to manage the selection process with Advisory Board.</p> <p>National Alliance to prepare contracts</p> |
| Manage projects in years 2 and 3. | Complete each project #5-12 | <p>Projects #5-8 completed by 9/30/20</p> <p>Projects #9-12 completed by 9/30/21</p> | <p>Mark Medema and Project Team to manage projects and summarize findings</p> |
| Disseminate Best Practices | Disseminate findings for each project #1-12 | <p>Projects #1-4 disseminated by 9/30/19</p> <p>Projects #5-8 disseminated by 9/30/20</p> <p>Projects #9-12 disseminated by 9/30/21</p> | <p>National Alliance to manage dissemination mechanisms with advice and guidance from the Project Team</p> |
| Evaluate Outputs | Complete evaluation of findings and prepare report for | <p>Evaluate year 1 outputs by 9/30/19</p> <p>Evaluate year 2 outputs by 9/30/20</p> | <p>JMC to evaluate outputs and report findings</p> |

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| | submittal to USED each year of the three-year grant | Evaluate year 3 outputs by 9/30/21 | |
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(2) The extent to which the costs are reasonable in relation to the objectives, design, and potential significance of the proposed project;

The cost of this proposal is reasonable in relation to the objectives and design of the project. The year one activities include the identification and development of four pre-identified best practices and the dissemination of these best practices to the field. This equates to an average cost of \$200,000 per project. This is a reasonable value for the cost of a project, especially given the potential significance of each project.

As stated earlier, the potential significance of this project is enormous. By some estimates, the total value of all charter school properties and leases is more than \$40 billion. Each year, charter schools are spending more than \$4 billion in annual lease and mortgage payments on the full value of their properties. Even small reductions in the cost of projects or the costs of financing can add up quickly. If charter schools could reduce their interest rate by 1%, approaching what traditional school districts pay, then the savings to schools could be \$100 million each year. Similarly, a 1% reduction in the cost of facilities would have saved schools hundreds of millions of dollars over the past 25 years. Given that context, this request for approximately \$800,000 per year for three years could have substantial benefits. These types of results could take years to materialize and are beyond the scope of measurable results for this three-year grant, but a long-term vision of a more equitable facility and financing landscape is the motivation for the CSFC.

(3) The relevance and demonstrated commitment of each partner in the proposed project to the implementation and success of the project.

The National Alliance for Public Charter Schools has invested considerable time and resources into helping the charter school sector navigate facilities issues for several years. Earlier this year, the National Alliance released *Strengthening Federal Investment in Charter Schools Facilities* (see Appendix E9), an examination of what could be done at the federal level to provide additional resources to charter schools to access buildings, and to create incentives for states to address inequalities in the allocation and funding of buildings. This paper was the product of more than a year of research and inquiry with some of the more experienced stakeholders in the movement.

Additionally, through our state support program, the National Alliance has prioritized access to facilities through the model law rankings and our new sector development community of practice (a community of practice focused on the development of the charter school sectors in Alabama and Mississippi). As part of the National Charter Schools Conference the National Alliance curates content specific to facilities and facilities financing, and has hosted information and networking sessions to encourage collaboration between facilities experts and charter school leaders.

The Tennessee Charter School Center, a charter school support organization (as defined by the notice), is a valued partner in this project. They have already helped identify two of the four pre-selected projects for the first year of the proposal. Their relevance is that they will be responsible for managing the day-to-day activities for these two projects (“Facility Data Transparency” and “Local Capacity Building through Technical Assistance”). They have already demonstrated their commitment to this proposal by having piloted one of these projects last year hosting a local technical assistance program in Memphis. They brought together subject matter

experts for facilities and hosted an information session with a dozen school leaders. They are committed to the continued success of that program in other states. With the support of this grant, they can also document the program and disseminate the program throughout the country.

D. Project Personnel

(1) The extent to which the applicant encourages applications for employment from persons who are members of groups that have traditionally been underrepresented based on race, color, national origin, gender, age, or disability;

The FCSC may hire staff, contractors³, and interns to conduct some of the operations described above. The two Partners (National Alliance and TCSC) each have hiring practices that encourage applications from persons who are members of groups that have traditionally been underrepresented.

The National Alliance has set specific yearly recruitment goals around attracting, interviewing, and ultimately selecting more candidates of color during our hiring process. These practices have resulted in a high percentage of candidates of color applying for our positions. Candidates of color have been finalists for all our open positions and the National Alliance remains committed to employing a diverse workforce. In the recruitment process, the National Alliance has targeted our job posts to increase our applicants of color for our openings by posting on HBCU job boards, diversity recruitment job boards, and specific college alumni and social groups. A diversity recruitment statement was created to encourage candidates from diverse backgrounds to apply for our roles. The National Alliance has sought feedback and suggestions from our current staff of color to attract and retain more applicants and employees of

³The National Alliance will use noncompetitive procurements, under the authority of 34 CFR 75.135, in partnering with the various entities described in the application and budget narrative.

color. Staff of color have provided suggestions around partnerships, professional development, and coaching opportunities to attract and retain employees and continue living our value of being a thriving and diverse workplace. These policies and procedures have resulted in a team where 75% of the members are from historically underrepresented groups, which is higher than the national average. The National Alliance also looks for partners who have similar efforts and similar results. The partnership with the TCSC demonstrates the value the National Alliance puts on diversity. The TCSC is comprised of a team where 86% of the members are from historically underrepresented groups.

(2) The qualifications, including relevant training and experience, of the project director or principal investigator

Mark Medema, Senior Advisor, National Alliance for Public Charter Schools

Mark Medema is an Adviser to the Charter School Facility Center where he has facilitated work on recent federal programs and authored the Alliance's previous report of the Facilities Task Force. He is also the Lead Designer of the Charter Impact Fund, a new non-profit social impact fund dedicated to providing low-cost, long-term capital to charter schools. The organization will bring \$600 million in low cost capital to charter schools. Prior to this, Mark was the Director of Strategic Initiatives for Building Hope, a non-profit charter school facility financing and development group. He raised over \$60 million in low cost capital for charter schools.

Previously, he worked for the KIPP Foundation helping replicate the success of KIPP in over 50 schools as the Director of Business Development and the Managing Director of the Real Estate Fund. He has participated in some of the most innovative facility strategies, including California's co-sharing program (Proposition 39), Colorado's direct bond participation program (he wrote the first application in 2002), the USDA's Community Redevelopment Program, the US ED's Credit Enhancement program, and Treasury's New Market Tax Credit program. Mark

received his bachelor's degree in civil engineering from Northwestern University and his MBA from the Kellogg School of Management.

(3) *The qualifications, including relevant training and experience, of key project personnel.*

The following provides a brief summary of the qualifications of key project personnel:

The National Alliance of Public Charters Schools (the National Alliance) is responsible for the management of the Charter School Facility Center and, along with the Project Manager, is specifically responsible for the implementation of three of the five projects, advisory council, convening, COP, dissemination.

Nina Rees, President and Chief Executive Officer, National Alliance of Public Charter Schools Rees has over 20 years of experience in Washington, D.C. Previously, she served as the first Assistant Deputy Secretary for Innovation and Improvement at the U.S. Department of Education. In this capacity, she oversaw the administration of 28 grant programs supporting 1,300 projects and was responsible for spearheading innovative federal programs and policies such as school choice, charter schools, alternative routes to teacher certification, and school leadership. Prior to joining the Department of Education, Nina served as Deputy Assistant for Domestic Policy to Vice President Dick Cheney. Previously, Nina served on the Board of Directors of the Charter Schools Development Corporation. Rees will be a key figure in the identification and recruitment of high-quality Advisory Council members and will engage with Advisory Council members throughout the life of this grant. Rees will also serve as an advisor to the Project Director and will contribute to dissemination strategies through earned media and speaking engagements and throughout her vast network.

Eric Paisner, Chief of Staff, National Alliance of Public Charter Schools Paisner worked as an attorney for Powers Pyles Sutter & Verville PC, advising clients on a variety of education

and corporate issues. He also served as a senior consultant with Arthur Andersen, specializing in strategic management solutions for large corporations and government agencies. Paisner is the Chief Operating Officer of the National Alliance and will be acting as an advisor to the Project Director and manage the execution of events. Paisner will be essential in the identification and recruitment of both the Advisory Council and the Community of Practice.

Christy Wolfe, Senior Policy Adviser, National Alliance for Public Charter Schools

Christy has more than 18 years of experience working on federal education policy. Christy spent eight years at the U.S. Department of Education, serving as the Associate Deputy Secretary for Policy. In this role, she managed policy development and implemented regulations for all federal elementary, secondary, and special education programs. Wolfe is the Senior Policy Advisor to the National Alliance, leading on policy issues of the organization. Wolfe has been the lead expert on facilities policy for the National Alliance team and will be a strategic and invaluable advisor to the Project Director, project partners, Advisory Council, and Community of Practice. Wolfe will be intimately involved in the execution of all projects implemented by the CSFC.

Kimberly McCabe is the Director of Digital Strategy and Communications at the National Alliance for Public Charter Schools. Kim manages the National Alliance website, social media accounts, email communications, and visual brand. Previously, She worked at Americans for the Arts, coordinating its state action network, online action center program, and external communications for the government affairs team. McCabe will lead and execute dissemination activities on behalf of the National Alliance, coordinate communications strategies with the Community of Practice, and oversee the development of the Rural Charter School Operators website.

Jessica Morffi is the Director of Policy and Government Relations for the National Alliance for Public Charter Schools and will be key contributor to this project. Jessica has more than 10 years of experience in education advocacy, previously serving as policy advisor to a state education chief and at the US Department of Education in the Office of Elementary and Secondary Education as well as the Office of the Secretary. Morffi will work closely with the Project Director, project partners, Advisory Council, and Community of Practice to execute all programs and projects of this grant.

Cameron Quick, Director, Tennessee Charter Schools Association Cameron has more than 13 years of experience in the education industry. Currently Cameron oversees operations and facility support for charter schools across the state of Tennessee. In the past year Cameron has assisted in securing over \$100M of facilities support for charters across the state. Prior to working in Tennessee, Cameron worked for the Arizona Charter Schools Association, supporting their 550+ schools with business and operations support. Cameron started his career in education teaching in orphanages in Tanzania followed by inner city schools in downtown Phoenix, AZ.

Jim Griffin, President, Momentum Strategy and Research is the founding President of Momentum Strategy & Research (MSR), a non-profit dedicated to conducting collaborative research among the many organizations serving charter schools across the country. Mr. Griffin has been involved in the advocacy of charter schools since the early 1990's. Mr. Griffin was the founding president of the Colorado League of Charter Schools, where he helped all charter schools including many rural charter schools navigate state law and facility funding options.

Angela Christophe, Producer, National Charter Schools Conference serves as lead producer of the annual Conference for the last six years, and has been a key member of the Conference team for over ten years now. Angie has expertise creating relevant programming

integrating adult learning practices in hundreds of sessions and numerous key note speakers. Angie will support the dissemination of content at the National Charter School Conference to ensure maximum reach and effectiveness.

Evaluator: Joey Gustafson of JM Consulting, Inc. serves the K-12 national market, specializing in assessing the needs of educational organizations and crafting solutions in order to support academic and organizational quality. Ms. Gustafson offers diagnostic program and organizational evaluations tailored to educational services and training that improve the educational and business objectives of charter schools and support organizations. She has experience in program development, research, evaluation, and public policy of public schools and programs. Having worked with charter schools since 1993 when only one state had a charter law, Ms. Gustafson has worked for major authorizers and funders over many years, developed over a dozen business/strategic plans for growing CMO's, and conducted evaluations for charter schools, investors and associations. Ms. Gustafson served as the Assistant Head of School at a charter school in Lawrence, Massachusetts: Community Day Charter School (CDCS). At CDCS, Ms. Gustafson was responsible for creating a standards-based curriculum and demonstrated a documented alignment to state standards. Ms. Gustafson holds an MBA from Boston University and a B.A. from Georgetown University.

E. Project Evaluation

The extent to which the methods of evaluation include the use of objective performance measures that are clearly related to the intended outcomes of the project and will produce quantitative and qualitative data to the extent possible.

The Charter School Facilities Center will contract with JM Consulting Inc. (JMC) to provide external evaluation for both formative and summative evaluative purposes. JMC has assembled an experienced evaluation team that is experienced in Federal grant evaluations. Previous federal evaluation work includes: The Building Charter School Quality project,

BAEO's Project Clarion, Arizona Charter School Association's Charter Starter program, and U.S. Charter Resource Center as hosted by AIR. Each of these evaluations were for U.S. Department of Education multi-year grants. JMC also has completed evaluations on school, nonprofit, and foundation programming. The team is experienced in charter school best practices as well as in working closely with multiple partners and constituencies on complex projects. The lead for this project will be Joey Gustafson, founder and senior consultant at JM Consulting Inc.

(1) Grantee Reporting Performance measures. How each proposed performance measure would accurately measure the performance of the project and how the proposed performance measure would be consistent with the performance measures established for the program funding the competition.

JMC will validate the performance measures listed as outputs and outcomes in the Logic Model (Appendix E6). These outputs and outcomes are aligned with the purpose of the U.S. ED Charter School Program (CSP) and this National Dissemination Grant. These include expanding opportunities for all students, particularly underserved students, to attend charter schools; increasing the number of charter schools; exchanging best practices among all schools; encouraging states to provide facilities funding; and improving charter school access to facilities and facility financing, especially for schools for underserved populations.

As outputs the CSFC will:

- Create an advisory council and solicit best practices to be developed and disseminated.
- Create a community of practice and select best practices to be developed & disseminated.
- Summarize the finding of four best practices each year of the three-year grant.
- Convene the community of practice five times over the three-year grant period.
- Disseminate the findings of four best practices each year of the three-year grant.

JMC will document the CSFC's projects by year. Given the nature of these projects ("Facility Data Transparency", "Replicating USDA Financing Success for Rural Charter Schools", "Local Capacity Building through Technical Assistance", and "Accessing District Space"), the true *outcomes, or the vision*, of these projects will likely be realized over multiple years in the future. As such, JMC will use an *activities' based logic model* for evaluation purposes. JMC will also collect and present both qualitative and quantitative short-term outputs and outcomes. JMC will further share any evidence that tests and gives formative guidance to the CSFC regarding the *theories* about the key drivers of the projects and activities and how they affect the following outcomes:

- An increasing number of requests for data from the facility database (website hits, live requests);
- An increasing number of citations of the data and the database;
- An increasing measure of usefulness of the data by facility professionals;
- An increase in the number of schools financed by USDA;
- An increase in the number of schools financed and dollars invested in states historically underrepresented by USDA;
- An increased amount of enhanced technical capacity for facilities at the school level;
- An increase in the number of states replicating the capacity building events
- An increase in the number of CSOs and districts using the Toolkit to drive access to district space

(2) Baseline data. (i) Why each proposed baseline is valid; or (ii) If the applicant has determined that there are no established baseline data for a particular performance measure, an explanation of why there is no established baseline and of how and when, during the project period, the applicant would establish a valid baseline for the performance measure.

JMC will validate the following baseline data for the various performance measurements.

There is limited baseline data depending on which performance measurement is being used. The baseline data for the outputs is essentially zero:

- There is no national facility Advisory Council, nor any community of practice.
- There are no national or multi-state studies of best practices of facility funding strategies.
- There are no convenings specifically focused on facilities and facility financing.
- Communication forums such as the National Charter School Resource Center disseminate findings periodically. They average one nationally significant report per year.
- By the end of the first year, JMC will determine baseline data through research of existing studies for each performance measure.

(3) Performance targets. Why each proposed performance target is ambitious (as defined in this notice) yet achievable compared to the baseline for the performance measure and when, during the project period, the applicant would meet the performance target(s).

JMC will measure the performance targets annually to measure the success of the program against the goals, objectives, outputs, and outcomes.

The performance targets that will be measured are the following:

- Convene the AFP five times in three years.
- Select, commission and execute 4 best practice projects each year for three years
- Disseminate findings for 4 best practice projects each year for three years

Each of these is ambitious yet achievable.

- There are currently no convenings and the CSFC plans to start the process in year 1 and hold two convenings in years 2 and 3.

- Currently there is approximately 1 best practice project completed each year and the CSFC expects to complete 4 in the first year, and each year thereafter.
- The CSFC plans to disseminate 4 best practice studies each year for three years. This is a fourfold increase over current levels.

The timeline for meeting these performance targets are:

- The convenings will be held by the end of each federal fiscal year.
- The studies of best practices will be completed by the end of each federal fiscal year.
- The dissemination of best practices will be completed by the end of each federal fiscal year.

(4) Data collection and reporting. (i) The data collection and reporting methods the applicant would use and why those methods are likely to yield reliable, valid, and meaningful performance data; and (ii) The applicant's capacity to collect and report reliable, valid, and meaningful performance data, as evidenced by high-quality data collection, analysis, and reporting in other projects or research.

JMC will document all the Facilities Center's activities as well as collect constituent feedback using a variety of data collection methods (via survey, web-analytics, interviews, and focus groups, attending various CSFC events, and having regular calls with the CSFC staff). Data will be collected from constituents, which includes schools, project-specific participants, participants in technical assistance events, finance professionals, policy makers, and internal partners. This targeted direct data collection methods are more reliable than broad collection tools that may have limited response rates. They are more meaningful than impersonal data collection because they allow the recipient to provide insights into the responses that are not captured in mass research. These respondent insights will allow for continuous improvement in the program's implementation. JMC will not only collect this data for the CSFC, but will also offer analysis of what is working and recommendations for improvement.

The National Alliance and JMC have the capacity to collect data based on a long history of data collection, analysis, and reporting. Currently the National Alliance collects data on charter school enrollment, demographics, school focus/curriculum model, authorizer, management organization, and geographic school district among many other variables.

As mentioned earlier, JMC has completed the following work: The Building Charter School Quality project, BAEO's Project Clarion, Arizona Charter School Association's Charter Starter program, and U.S. Charter Resource Center as hosted by AIR. Each of these evaluations were for U.S. Department of Education multi-year grants.

JMC will provide the CSFC with one formative evaluation report per year (mid-year) as well as one summative evaluation for the year (end-of-year). Both reports will include the documentation of CSFC's activities. JMC will also meet virtually or in person with the CSFC's staff to review each quarter's findings and recommendations.

The summative external evaluation will seek to assess the use and impact of the CSFC's work. These use and impact assessments will align with the CSFC's major goals by year. JMC will track activity performance and any early-stage impacts for the CSFC's two major strategies:

1. Develop, identify, and expand best practices for facilities solutions
2. Disseminate new, innovative solutions and the existing best practices to public-school leaders, both charter and district, and other stakeholders

The summative evaluation will include the collection of data from various constituents for each of the CSFC's tasks.

In Year 1, JMC will create a full external evaluation design for the CSFC's three-year grant with the U.S. Department of Education. Ultimately, this summative evaluation design will result in a final Year 3 Summative Evaluation which will report on the entire grant. JMC will

collect baseline data in Year 1, do interim formative reporting, and plan to pilot the full evaluation design by Year 2. The external evaluation design will utilize the CSFC's annual measurable performance objectives and project targets. Also included with the annual summative evaluation reports will also be a summary of the CSFC's achievements and highlights of products.

Application Requirements

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